UNITED NATIONS

ECONOMIC AND SOCIAL COUNCIL

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SPANISH

Second regular session of 1990
Geneva, 4-27 July 1990

LIST OF DELEGATIONS
LISTE DES DELEGATIONS
LISTA DE LAS DELEGACIONES

NOTE: Delegations are requested to send their corrections to the following list in writing to the Secretariat of the Council, Room E-3056, Palais des Nations.

NOTE: Les délégations sont priées d'envoyer leurs corrections à la présente liste, par écrit, au Secrétariat du Conseil, bureau E-3056, Palais des Nations.

NOTA: Se ruega a las delegaciones se sirvan enviar sus correcciones a la siguiente lista, por escrito, a la Secretaría del Consejo, oficina E-3056, Palais des Nations.

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* From 4 to 12 July
** From 13 to 27 July

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International Maritime Organization	Mr. W. A. O'Neil	Mr. F. Labastida	
World Intellectual Property Organization	Mr. Shahid Alikhan	Mr. Farag Moussa Mr. Vladimir Yossifov	
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International Fund for Agricultural Development	Mr. Idriss Jazairy		
United Nations Industrial Development Organization	Mr. D.L. Siazon	Mr. H. Mehdi Ms. I. Lorenzo Mr. D. Rakotopare Mr. A. De Groot	

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General Agreement on Tariffs and Trade	Mr. Alain Frank	Mr. H. A. Millan	

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Organization of African Unity	Mr. Amr A. Moukhtar Mr. Usele Mawisa Mr. Mohamed H. Tunis Mr. Abdelaziz Farag Mr. Negousse Desta

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International Chamber of Commerce	Mr. John Kraus
International Confederation of Free Trade Unions	Mr. E. Laurijssen
International Council of Women	Ms. Jeannine de Boccard Ms. Mary Nyameckye
International Federation of Business and Professional Women	Mrs. Nicole Piaget Mrs. Gabrielle Gonzenbach
International Organization of Employers	Mr. Costas Kapartis Mr. Roy Chacko Mr. Jean Dejardin Mr. Jean-Jacques Oechslin
Inter-Parliamentary Union	Mr. Pierre Cornillon Mr. Iouri Klioukine Mr. Francis Wilcox
Soroptimist International	Ms. Ursula Hemmerich-Barter
World Confederation of Labour	M. Blaise Robel Mme. Béatrice Fauchère-Pittet
World Federation of Methodist Women	Ms. Renate Bloem
World Federation of Trade Unions	Mr. Daniel Retureau Mr. Albert Potapov
World Federation of United Nations Associations	Mr. Marek Hagmajer Mr. L.H. Perera

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Co-ordinating Board of Jewish Organizations	Mr. Daniel Lack
International Association of Educators for World Peace	Mr. Henry Bandier
International Council of Jewish Women	Ms. Leila Seigel Mme. Andrée Farhi Mme Rachel Spira
International Council of Environmental Law	Mr. Henry Bandier
International Federation of University Women	Ms. D. Davies Ms. G. Kengan Ms. P. Shaw
International Federation of Women Lawyers	Ms. H. Pfander
Pan-Pacific and South-East Asia Women's Association	Ms. Connie Jones
Women's International League for Peace and Freedom	Ms. Edith Ballantyne Ms. Duika Watson Ms. Andrea Olson Ms. Jenny Pryke
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Second regular session of 1990
Geneva, 4-27 July 1990

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Addendum

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UPDATE ON THE WORLD ECONOMY, 1990*

Note by the Secretary-General

I. GROWTH OF WORLD OUTPUT

The prospects for the world economy have worsened considerably in the last few months. The sense of optimism that was generated by the dramatic changes in Eastern Europe and the reduction of tension between the super-Powers, has come to be replaced by a great uncertainty about the immediate prospects for the world economy. This is mostly due to the recent developments in the Persian Gulf, but the current economic trend in a number of countries, particularly in Eastern Europe, also appears worse than expected, and in many cases it is almost certain to be further worsened by the Gulf crisis.

The situation in the Gulf has greatly reduced the predictability of the world economy even for the nearest future. There is little doubt, however, that the rate of growth of world output in 1990 will be considerably lower than estimated earlier, perhaps the lowest since 1982. The growth of the world economy, which had already slowed to around 3 per cent in 1989 from 4.4 per cent in 1988, is unlikely to be much more than 1 per cent in 1990. Growth in the developed economies will decelerate for the second year in a row. But a large source of the slowing of world growth has been the sharp decline in output in Eastern Europe and the Soviet Union, and the fall in output in the Gulf countries and a larger than expected deceleration in China also contribute to this outcome.

The growth of world trade, which has been remarkably strong in recent years and was expected to be around 6 per cent in 1990, may slow to around 5 per cent as a consequence of the crisis, compared with almost 7 per cent in 1989. This is, nevertheless, comparable to the 1970s and much higher than the average of the early 1980s.

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* This note brings up to date the assessment of the world economy contained in the World Economic Survey, 1990 (United Nations publication, Sales No. E.90.II.C.1), issued in June 1990, and is based on information available as of mid-September 1990.

A. Developed market economies

Growth in the developed market economies was projected to slow down to around 2.3 per cent in 1990 from 3.5 per cent in 1989, which already represented a deceleration from 4.3 per cent achieved in 1988 (see table). Growth in 1991 is likely to decline further to around 2 per cent, as against the earlier forecast of around 3 per cent.

There has, however, been a considerable difference among individual countries. Among the major economies, deceleration of growth in 1990 has been sharp in the United States of America, while Germany is expected to grow almost as fast as in 1989 and Japan somewhat faster than before. A mild upturn is expected in the United States economy in 1991, while some of the other major industrial economies are expected to slow down further.

The rate of unemployment has been inching up in the United States as well as in the United Kingdom in recent months, though the United States rate remains low by the standards of the last two decades. In some of the other major industrial countries, where growth has remained strong, unemployment continues to decline, but this may change as their economies slow down in the coming months. At the same time, the rate of inflation has been rising in most developed market economies. It increased modestly in most of these economies in 1989, and the recent rise in energy prices, coupled with the continuing strength of some of these economies, has begun to push it up again in recent months.

The response of the policy makers to the new prospects has so far been cautious. In most of the developed countries policy makers have opted for a continuing firm stand against inflation, to which the recent rise in oil prices has significantly contributed. But the recent rise in oil prices poses a well-known dilemma: it will tend to raise prices throughout the economy, but in net oil-importing countries this is not the same kind of inflation that is due to excessive wage demands or monetary expansion. An attempt to keep the average price level stable would have to involve driving down non-oil-related prices, and this might well be sharply recessionary. The threat of combined recession and accelerated inflation, which is all too familiar from the stagflation of the 1970s, is thus a very real one at this time.

B. Eastern Europe and the Soviet Union

The euphoria engendered by the dramatic political changes in most of Eastern Europe in late 1989 and early 1990 has since given way in most countries to more sober assessments of what can be achieved in the short run. Elsewhere in the region, most notably in the Soviet Union but also in Bulgaria and Romania, the debate on the kind of economic reform eventually to be put in place continues to be waged. Even countries with the most positive outlook on reform have in fact not progressed very far beyond where matters stood in early 1990.

Many of the adjustment efforts that these countries embarked upon in early 1990 have led to sharply lower levels of economic activity. Negative output growth

has been typical for the group and considerable capacity is being idled in the process. This can be attributed to the new economic circumstances, as some of the past capital stock is now uncompetitive, as well as to strikes and social disorganization. But the drop in output stems also from the yet undecided question of how and how quickly to switch from central planning to a market environment and what needs to be done in the process of transition to maintain some measure of stability and order. In some countries, the economic slump has been accompanied by rapidly rising unemployment and high inflation, in spite of the fact that there has been a serious delay in passing on to the consumer the new economic discipline in terms of market-clearing product and factor prices.

No country of the group has achieved positive growth so far in 1990. Although data are still preliminary, the contraction of aggregate output, as measured by NMP levels in the first half of 1990 compared with the same period in the previous year, has been of the order of at least 12 per cent for Eastern Europe and probably 5 per cent for the Soviet Union. The average for Eastern Europe masks a wide dispersion, however. In Czechoslovakia, for example, the contraction has thus far been rather mild (perhaps 2-3 per cent). But in Poland and Romania the recession has been on the order of 20-25 per cent. Particularly strongly affected has been industry, where the contraction in Eastern Europe averaged about 15 per cent, again masking a wide variety of individual country performances. The industrial slump in Czechoslovakia was only 2.5 per cent in the first half of 1990, whereas it reached close to 20 per cent in Romania and 30 per cent in Poland. Agriculture has performed better than the overall performance throughout the group. The Soviet Union attained a bumper harvest but then ran into severe harvesting, transportation and storage problems. Several Eastern European countries, including Czechoslovakia, also registered a bumper crop. But others, including Hungary (because of long drought) and Poland (for lack of credit for fertilizers, pesticides and related inputs) and probably much of the Balkans, did not do so well. Looking at other sectors, however, construction and investment activity in general, as well as foreign trade have all shown sharply lower performance than in the corresponding period of 1989.

The sudden rise in energy prices may be a boon to the Soviet economy, given the size of its fuel exports both to Council for Mutual Economic Assistance (CMEA) partners and to markets in Western Europe. Declining fuel production, particularly oil, may however restrict the Soviet Union's ability to capitalize fully on the sudden spurt in world oil prices.

The constraint facing these economies has multiple origins. One of the most outstanding is the anticipated switch-over in trade and payments régimes in CMEA relations to convertible currency payments and world prices. In addition, the collapse of CMEA as a regional economic organization and framework of collaboration for the countries of Eastern Europe and the Soviet Union, without the member countries having come to some alternative arrangements, simply compounds the disarray in policy-making. The replacement of the former CMEA arrangements with thoroughly bilateral trade and payments agreements, which exhibit a degree of rigidity that may be more formidable than that experienced in the immediate post-war period, does not augur well. Also very important have been the sudden renunciation of previously concluded long-term specialization and trade contracts

(for example, in the German Democratic Republic, Poland and the Soviet Union) and the sharp deterioration in terms-of-trade because of the situation in the Persian Gulf.

As regards prospects, the external payments constraints, of the Eastern European countries in particular, suggest a protracted period of austerity with very sharp downward adjustments in absorption levels. Few policy makers in the area appear to be willing to see the merits of regional co-operation, such as the formation of a customs union and the introduction of a payments union for the radically reforming countries. Instead, most hope that Western assistance will be forthcoming not only to offset the deterioration in the terms of trade but also the expected sharp payments deficit with the Soviet Union. Inasmuch as the latter assistance is unlikely to be available in the magnitudes needed to maintain economic activity at reasonably high levels, there may be a sharp cut-back in aggregate demand in the group, with debilitating consequences for the reform movement and socio-economic stability in the area.

C. Developing countries

In the developing countries, growth has decelerated to its lowest level since 1983. Growth had already slowed down to around 3.4 per cent in 1989 and indications are that it may not exceed 2 per cent in 1990. The deceleration has been pervasive, covering most regions and a large number of countries. The reasons for the decline are diverse. These include problems of debt and stabilization, continuing structural difficulties, a crisis in international relationships and a cooling of overheated economies.

In Latin America, output is expected to decline by 1 per cent in 1990, the third consecutive year of decline in per capita output in the region. This is largely due to a 5 per cent fall in output in Brazil, which more than offset the improvement in a number of economies, including Mexico. Output declined in Argentina, while in Chile growth sharply decelerated. The growth of output in the region continues to be constrained by stabilization measures to correct macro-economic imbalances and by low rates of investment. The burden of external debt and the resulting outflow of resources continue to hobble many countries of the region.

Contrary to earlier expectations, in West Asia as a whole output is unlikely to increase in 1990. This is largely due to a sharp fall in output, as a result of the Gulf crisis, in Iraq, Jordan and Kuwait, which will probably not be offset by increases in other countries of the region.

In Africa, growth is expected to improve marginally to 3 per cent in 1990. Yet this is not enough to prevent a further fall in output per capita on the continent. Many of these countries are continuing with much-needed programmes of structural reform. However, these have yet to translate themselves into sustained growth. A number of countries of the continent will benefit greatly from the recent rise in oil prices, but others will experience a significant increase in import bills at a time when non-fuel commodity prices continue to be weak.

In contrast to the above regions, the deceleration of growth in South and East Asia in 1990 is modest, and the region remains the fastest growing in the world. The newly industrializing countries of the region, as well as some of the other economies, are expected to grow at least as fast as in 1989 though a slowdown necessitated by supply bottle-necks, and slackening of export growth is evident in a number of countries. The deceleration of world growth expected in 1990 and 1991 will undoubtedly affect the growth of these economies, but some of them have been acquiring internal dynamism of their own, which may be strong enough to partly counterbalance a slackening of external demand. Among the large countries of the region, India is expected to grow relatively slowly, compared with its recent growth record, as the country faces a large fiscal deficit and external imbalance which is likely to be aggravated by the Gulf crisis. Pakistan faces a similar set of problems but expects to achieve a growth rate comparable to that achieved in recent years.

In China growth decelerated sharply in 1989 after a decade of exceptionally high growth which doubled per capita income in a country that accounts for over a quarter of the population of the developing world and has the largest concentration of the world's poor. Rising inflation and growing imbalance in the economy led to the introduction of drastic stabilization measures that sharply reduced the rate of growth in 1989 to around 4 per cent from over 11 per cent in 1988. In 1990, while inflation has been brought under control, economic growth has been substantially slower than targeted and is unlikely to be more than 3 per cent. The recent policy of stimulating investment and output by easing credit supply has not produced the desired result. Industrial output remains sluggish, though growth of agricultural production to date has been satisfactory. Domestic economic reform has taken secondary place in economic policy. Comprehensive price and enterprise reforms, which had been priorities on the reform agenda in 1988, remain on hold and only selected price increases in some transport and communication services, crude oil and light manufactures were implemented this year.

II. IMPACT OF THE GULF CRISIS

The Gulf crisis has already taken its toll in the form of higher inflation and loss of confidence in the world economy, which was already slowing down; it has involved the loss of livelihood to hundreds of thousands of emigrants working in Iraq and Kuwait. Predictions about its future impact are virtually impossible.

The following scenario based on the LINK world economic model, is only one of many possible scenarios. It makes the crucial assumption that war will not break out, and that the price of crude oil will average $32 per barrel in the fourth quarter of 1990 and will settle at $30 per barrel in 1991. It also takes into account the effects of the trade embargo on exports and imports of the trade partners of Iraq and Kuwait, including its impact on workers' remittances. Short-term interest rates and exchange rates are assumed to remain unchanged. The main results of this scenario are summarized below:

(a) Growth of the developed market economies will in 1990 be 0.4 per cent lower than it otherwise would have been, and about 1 per cent lower in 1991;

(b) Unemployment in the developed market economies will edge up by 0.6 per cent, while the rate of inflation will increase by 1 per cent;

(c) Growth in the developing countries as a whole will be 0.2 per cent lower in 1990 and 0.5 per cent lower in 1991. This assumes, however, that external finance will be available to meet the additional payments gap of oil-importing developing countries resulting from the crisis. Otherwise, growth rates will be lower, perhaps much lower;

(d) The merchandise trade balance of the net energy-importing developing countries will worsen by around $17 billion in 1990 and $42 billion in 1991, while the net energy-exporting countries' trade balance will improve by $53 billion and $133 billion in the two years, respectively;

(e) The trade balance on service accounts of the developing countries most affected by the crisis will worsen by around $7 billion in 1990 and $17 billion in 1991. Much of this is due to loss of workers' remittances from Iraq and Kuwait;

(f) The trade balance of Eastern Europe is expected to deteriorate by $3 billion in 1990 and $9 billion in 1991. The balance for the Soviet Union will improve by $10 billion and $27 billion in the two years, respectively.

III. EXTERNAL DEBT AND FINANCIAL TRANSFER FROM THE DEVELOPING COUNTRIES

While the world's attention is concentrated on the crisis in the Gulf, the long-term issues of the world economy remain. The burden of external debt continues to be a major obstacle to growth and development in many developing countries. The external debt of the capital-importing developing countries surpassed $1 trillion in 1986 and continued to grow, though at a much slower pace than before. Indications are that in 1990 it may exceed the preliminary estimate of $1.13 trillion for 1989. Debt-service payments as a proportion of exports have been falling in recent years, but this was partly because some countries are not able to service their debt.

The Gulf crisis will increase the real debt burden of oil-importing and indebted developing countries. Short-term interest rates increased in 1989, and in the aftermath of the crisis they are not expected to decline soon as fighting inflation remains the most important objective of policy in developed market economies. Non-fuel commodity prices could be further depressed as world demand slackens. On all counts, the real debt burden of many developing countries will increase at the same time as their balance of trade worsens by tens of billions of dollars. Energy-producing debtor countries, on the other hand, will gain by similar amounts or more from the recent increase in oil prices, as will other energy producers. This sudden redistribution of income and wealth has the potential of throwing the world economy into renewed turmoil and once again raises the question whether a world economy thoroughly dependent on oil can afford the present instability in oil markets.

IV. COMMODITY PRICES

Non-fuel commodity prices have been falling over most of the 1980s. This greatly contributed to the economic difficulties of a large number of countries, many of them in sub-Saharan Africa. Prices rose substantially during 1987-1988 after having reached record low levels, but started to weaken in 1989. In the first half of 1990, dollar prices were almost 7 per cent lower compared with the same period last year (see figure 1). The fall in real terms - i.e., adjusted for changes in prices of manufactured exports - was even greater, around 13 per cent. The prospects for the coming months are for a further weakening of commodity prices, as the world economy slows down.

Oil prices weakened over the first half of 1990, declining by around 30 per cent before events in the Persian Gulf set them soaring. But by mid-September prices had risen by over 40 per cent above their January level (see figure 2). The future course of prices is unpredictable. A dramatic increase in the case of a war, or an equally dramatic decline following a quick resolution of the crisis cannot be ruled out.

V. THE URUGUAY ROUND

Efforts continue to strengthen the functioning of the international economy in the multilateral trade negotiations under the Uruguay Round. The talks have fallen dangerously behind schedule. According to the schedule of work decided on by the Trade Negotiations Committee (TNC), the umbrella body for conduct of the negotiations, broad agreements were to have been reached in each of the negotiating groups by July-August 1990, and legal texts of agreements were to be finalized in the following months and signed in December, the deadline for the completion of the Round. In fact, little was achieved by way of agreement in the latest rounds of negotiations reported at the TNC meeting in July. Serious differences in country and group positions remain in virtually all areas, including the critical areas of agriculture, textiles, safeguards, intellectual property and trade-related investments.

A new time-table of intense negotiations has been worked out to complete the work by December. The amount of complex negotiating work still to be completed has engendered a sense of apprehension about the success of the Round, even though most negotiators express their determination to face up to the challenge. Some of the recent events which are directly relevant to the negotiations do not appear encouraging. The textile bill now in the United States Congress, but under the threat of Presidential veto, aims at severely restricting textile imports at a time when negotiators at the Uruguay Round are aiming at reducing such restraints. The recent failure in the European Economic Community (EEC) to agree to a set of proposals to reduce agricultural subsidies that could have been acceptable to the United States does also not augur well for the success of the Round. Only a determined political initiative taken from the national capitals and an enhanced awareness of the cost of failure can ensure success.

VI. A PRELIMINARY ASSESSMENT OF 1990

The year 1990 showed how fragile the international political framework of economic development still remains. A large number of developing economies have been in decline for almost a decade, and by mid-year the economic outlook in Eastern Europe and the Soviet Union appeared more pessimistic than before. Growth of output in the developed market economies was heading for a modest decline after a long period of steady growth. Yet, the continuing strength of some of these economies, the robust growth of world trade and, most of all, the dramatic changes in Eastern Europe and the disappearance of super-Power tension, raised hopes for continuing prosperity in many parts of the world and for a better use of world resources for the solution of its pressing economic and social problems. These hopes were shaken by the events in the Gulf, which have greatly increased risks and uncertainties, to an extent that cannot at this moment be assessed with any precision.

The world economy will probably record its slowest growth since 1982. Most groups of countries are expected to slow down and some will probably suffer large declines in output. Among the developed countries, in the United States growth is sharply decelerating. Among the developing regions, in Latin America and the Mediterranean output is expected to decline. In China, deceleration of growth continues. In South and East Asia alone growth remains robust, though even here a slowdown has taken place. In Eastern Europe and the Soviet Union there has been a significant fall in output. The reasons for the slowdown and decline are diverse but the sharp rise in oil prices will aggravate the debt situations of many countries so profoundly as to add new debt crises on top of old ones.

Meanwhile, the long-term issues of development remain. Numerous countries struggle with problems of structural adjustment and reform. Negotiations have reached a critical stage at the Uruguay Round and its successful conclusion remains a major challenge.

Growth of output by region, 1981-1991

	Rate of change of gross domestic product (annual percentage rate)					
	1981-1986	1987	1988	1989 a/	1990 b/	1991 b/
World	2.8	3.5	4.4	3.1	1.0	2.0
Developed market economies	2.3	3.2	4.3	3.5	2.3	2.0
North America	2.5	3.4	4.6	3.1	1.2	1.3
Western Europe	1.7	2.6	3.6	3.4	3.0	2.5
Developed Asia	3.3	4.4	5.5	4.7	4.2	3.5
Eastern Europe and the Soviet Union c/	3.2	2.6	4.1	1.2	-5.0	0.0
Developing countries	2.7	4.1	4.5	3.4	1.8	3.8
Western Hemisphere	1.0	2.8	0.4	0.7	-1.0	4.0
West Asia	-1.2	-1.2	1.3	2.5	-0.0	2.0
South and East Asia	4.9	6.4	8.2	6.2	5.3	5.0
China	9.2	10.6	11.4	3.9	3.0	5.0
Africa	-0.9	0.7	2.4	2.8	3.0	2.5
Mediterranean	3.1	3.7	3.2	2.1	-1.3	3.5

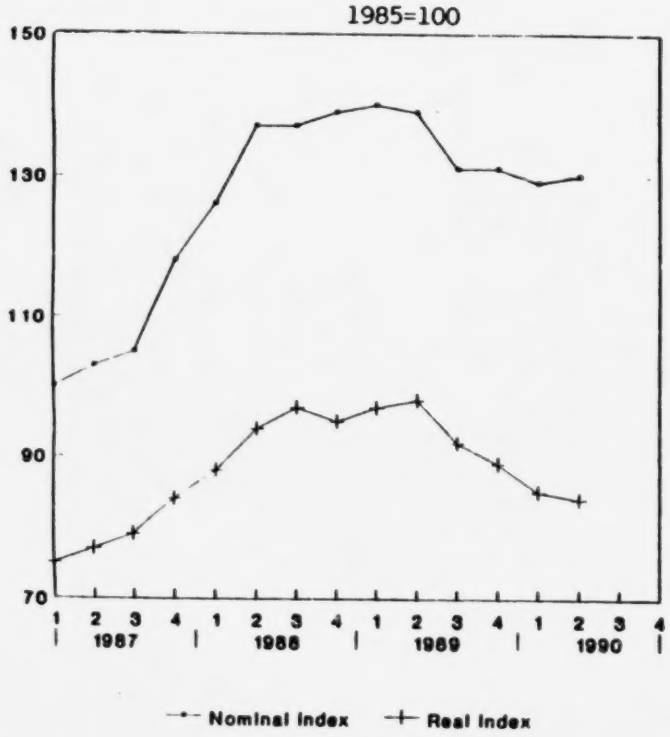
Source: Department of International Economic and Social Affairs of the United Nations Secretariat.

a/ Preliminary estimate.

b/ Forecast based on Secretariat estimates and Project LINK.

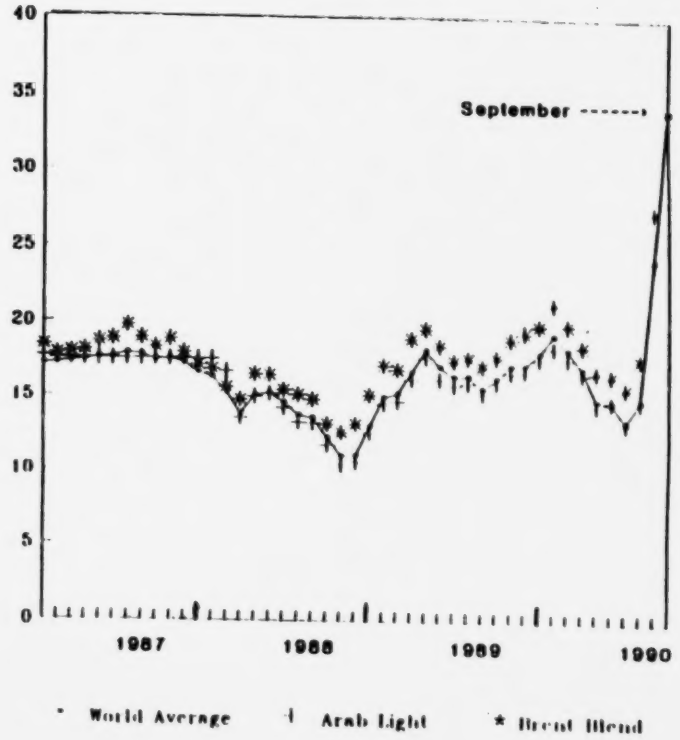
c/ Net material product.

Figure 1. Prices of non-fuel commodity exports of developing countries 1987-1990



Source: UN/DIESA, based on data of UNCTAD, Monthly Commodity Price Bulletin.

Figure 2. Crude oil prices, 1987-1990
(Dollars per barrel)



Source: UN/DIESA, based on U.S. Department of Energy, Weekly Petroleum Status Report and other sources.